An In-depth look at the buying process from 12 different perspectives

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#HowIBuy is a customer-centric series on how decision-makers buy.

We have conducted dozens of interviews with senior buyers and they have confirmed our suspicion:

**Sales is not changing – it is change.**

In #HowIBuy Volume 1, we take you from CTOs to marketing and sales leaders, and you’ll see a number of key themes emerge from the interviews. Luckily, we’ve summarized them for you. We recommend that you scan the list below to get a feel for them, then dive into the following pages of buyer psychology based on your customer profile or target role.

Key themes discerned about the modern buyer include:

- **B2B buyers are behaving like consumers** - Buyers today have easy access to information and networks that guide their decision-making long before they speak with sales. They control timing and they know what they want. Smart teams will embrace this by focusing on being a strategic advisor.

- **You must discover & adapt to their process** - Sales pros must discover a buying process early and be helpful in navigating an organization’s unique process for making buying decisions. It will vary by company stage, industry, and customer type. Sales teams should find out who to involve and what success looks like up front. Then collaborate with them on running a pilot that helps with their decision.

- **Add value by helping them think differently** - True value is not added through sharing information – today’s buyers use websites for that. The sales pro needs to play the role of a strategic advisor or consultant to ask questions that help with the “last mile” of a buying decision.

- **Trust must be built across a committee of buyers** - Decisions today are not only made at the top - in fact, they are often made on the front lines. Good leaders trust their subject matter experts and advisors, and they involve a group in making purchase decisions. Embrace this.

- **They try first, buy second** - A pilot, paid or unpaid, is a necessity in today’s environment. Pilots make on-boarding and customer experience central to the buying experience. So, smart teams will focus their efforts on delivering in a pilot to win customers.

- **Their networks are everything, so target them** - Every leader has a network of peers and industry experts whose opinions they value. The echo chamber can be loud, and it often has a powerful impact on decision making processes taking place behind the curtain. Recognize it. Harnessing warm introductions from your network and identifying industry advocates are critical to a team’s long term success.
As co-founder of a startup focused on helping teams sell, I talk a lot about sales and selling. In a lot of conversations, that eventually leads to the question of “okay, but how exactly do YOU buy?”.

It’s a great question, albeit a tricky one. The truth is, at Nudge, I spend a lot of money on (mainly) technology and software. However, how I buy is nothing like how many organizations are trying to sell to me. As I tried to describe how I buy, many times I had to fight the temptation to describe something that would be more familiar, even though it was not true.

That helps no one, so although this may be a bit uncomfortable to some sales teams, here is my best articulation of how I buy:
Trust my Experts:
First and foremost, the majority of the decision is made on the front lines. At Nudge we have worked hard to hire an amazing team of deeply knowledgeable experts, and the last thing I’m going to do is try to “out-expert” them. They know their areas far better than I do, so my involvement is mainly around prioritization of spend, non-technology alternatives (can we think about the problem in a completely different way), poorly considered ramifications (will this affect a team or a process in a way we might not have thought through), and sizing (are we looking to spend more than the problem is worth).

Proof is Reality:
We buy nothing without trying it first. That’s not a philosophy or a stance, we just don’t. I’ve looked. So proof of how good something is is purely driven by reality. Case studies are not reality. Demo systems are not reality. Videos are not reality.

Everything is a Nuance:
Every situation is different. Our data, processes, use cases, hardware, etc, are all unique. Not overly so, we try to do “standard” things as much as possible, but there will always be something that is unique to us that affects our success with a service. This means that we don’t buy until we’ve been hands on, in our environment, with our data and processes.

Education is DEEP:
When two or three options are brought toe-to-toe, the comparisons are deep and data oriented. Often that means learning how to run a system at a level of speed, scale, or complexity that is representative. The education resources that the team uses will be at that level of depth. Videos of track sessions at highly technical conferences, Git repositories, test data sets, etc. These resources probably don’t have the volume of views and clicks that other marketing resources do, but they need to be present.

Litmus Test with my Network:
I have never asked a salesperson for a reference. I’m not sure why I would, as I know they will select one of the most glowing, perfect examples. However, it takes 30 seconds for me to drop a question into one of the CTO forums or Slack channels that I’m part of, and get a short paragraph of perspective from two or three CTOs I trust.

Positioning is Relative:
None of the solutions that we bought were simply deemed “best”. All the positioning and comparisons were along the lines of “good if you need X, less good if you need Y”, or “strong if you are in situation A, weak in situation B”. This can be on any set of dimensions; price, scale, configurability, etc.
Timing is Everything:
There is a LOT of stuff our team could do. What we choose to do next is driven by many, many competing factors. There are many projects, solutions, and ideas that are on the “list” but that doesn’t mean we’re getting to them right away.

Free is Addictive:
We have bought more than a few services that were free up to a certain generous usage tier. We went in knowing that it would get embedded, we’d get hooked, and we’d end up paying significant amounts for it down the road. It still happened.

People are Relationships:
When people at a vendor have featured in the process, it’s about the relationship we have with them or that they bring to the table. Great service people have boosted a solution’s perceived level of support. Great sales people have introduced us to experts in the community on a technical topic, often not at their own firms. These efforts all matter a great deal.

So, if my situation is representative of the current reality of selling technology to CTOs, how does one sell into that reality?

• First, think through the overall buying experience, especially the parts that do NOT involve salespeople.
• Second, make education available. Deep, technical, and highly specific. It might not be high in views and clicks, but it’s powerful.
• Third, understand and embrace your position. You’re great at X, but not at Y. Don’t try to pretend to be great at X and Y.
• Fourth, focus your sales efforts on what you can provide. Additional resources a buyer might not have seen, data repositories, technical tools, tests for running actual comparisons.
• Fifth, think of your network as being a big part of your core value as a salesperson. What access can you provide to experts in the network, within your team, etc.
• Sixth, build an amazing product. More than ever before, the reputation of a great product becomes known on its own merits.

Glad to answer any questions on what does or does not work if I’ve missed anything. Good luck, and happy selling!
Last week’s article on “How I Buy” drove a phenomenal response from sales people, marketers, and executives who enjoyed reading the perspective of a buyer in today’s environment. We talked about it a bit at Nudge and decided that it would make sense to make a small content series out of the idea.

For the first of the “How I Buy” series, I’m thrilled to chat with Joe Chernov, Vice President of Marketing at InsightSquared. Joe is eternally on the cutting edge of marketing thinking and leadership, and one of the most thoughtful and strategic marketing leaders out there. His viewpoint on how he and his team learn about, evaluate, and decide to purchase any new services or technology is valuable for anyone selling to modern leaders, and especially valuable for anyone selling into the marketing space.

Here’s Joe on how he buys:
Tell us a bit about your company – what do you provide to the market?

Joe: I lead the marketing team at InsightSquared. In the simplest terms, we provide all of the reporting and analytics you’d like to get out of Salesforce, but, for whatever reason, can’t. In startup parlance, we’re ‘growth stage’ — 135 people, post-product/market fit, focused on blending growth with efficiency.

What is your role and what kind of things do you spend money on throughout a year?

Joe: As the marketing leader, I spend my programs budget in a few ways. In no particular order, let’s call the first “lead gen” vendors — CPC and CPL networks to help keep the top of our funnel full. Then there’s events. Because of the incredible cost and cost-of-distraction we have a go-big-or-don’t-go mindset when it comes to events. We sponsor Dreamforce (no brainer because we sell to the Salesforce installed base), SaaStr (because we’re particularly steeped in the tech vertical) and host our own event, Ramp by InsightSquared. Next is service providers. I have a strong team, so we don’t outsource very much. But we do use some outside writers, designers and specialists, like SEO or event planning consultants. Direct mail is another bucket. We run an account-based strategy, which, for us anyway, includes quite a bit of premium direct mail. Lastly, there’s technology. After we stuffed ourselves in 2016, we’ve spent 2017 trying to shed a few pounds.

How do you find out about what’s “out there”? How do you discover the latest solutions and approaches that might have a chance of making your world better?

Joe: I find out what’s “out there” for marketing purchases similar to the way I find out what’s happening in the news — my job is to curate a trusted network, and then I either discover something serendipitously through them or I ask them how they solve a particular problem. I find Slack to be incredibly interruptive for intra-organizational messaging, but invaluable for inter-organizational questions, like those on vendors or service providers. I’d include my team as core to this “trusted network.” At the margins, discoveries occasionally from walking tradeshow floors and, believe it or not, prospecting emails forwarded to me from my CEO. He must read and process much more quickly than I do, because he manages to read a generous number of BDR emails, messages I reflexively archive.
What role do you play in the decision process? What role do your front-line leaders play in the decision process?

Joe: We bought way too much software in 2016, so I’ve had to rethink my job, at least as it relates to purchases, from “fight management on behalf of the team” to “be a counterweight.” For example, when we’re evaluating a vendor or solution, I try to challenge the champion on timing (“Why can’t we do this manually for a little bit longer?”) and push for an internal business case (“How will we know it worked, or it didn’t work?”). I’ll also pressure test the solution and compare pricing by asking my trusted network. If we get to the point of negotiation, I’ll serve as “bad cop” in the discussions.

How do you prioritize what initiatives are “now” and what are “later”?

Joe: This is such a crucial question. Sometimes “when” matters more than “what” or even “if.” Our approach is to prototype internally in organizational processes or spreadsheets then automate, accelerate or expand with a tool once we’ve reached the point that we’re leaving value on the table because we lack technology.

How do you evaluate competing solutions? What types of evaluation approaches do you actually leverage in your evaluation?

Joe: I’ve never read a case study, nor have I ever called a vendor-supplied reference. Videos are helpful if I’m trying to get a basic sense of the tool, but once we’ve engaged with sales, we’re long past the point of utility with video. I’ve become insistent on trials. Only by using a product in your own environment can you surface some of the sales reps omissions — it’s the classic, “you don’t know what you don’t know” issue.

We’re talking to a vendor right now, and I have some doubts about the efficacy of the technology. But I do know that my team spends a lot of time recreating manually what this vendor can automate. So there is a use case for us, but I want to make sure it works — and I refuse to accept the vendor’s internal case studies as proof. I’ve insisted on a paid trial. But they won’t budge, which is exacerbating my doubts. I won’t buy without the trial. As far as evaluating versus competing solutions, I ask my CMO Slack groups for alternative options — sometimes because I want to see what else is out there, other times because it provides pricing leverage.
Joe: Because so much more data is available and because each new product you add affects the other solutions in your stack, finance’s expectations have justifiably skyrocketed. We don’t make a purchase of any size without a comprehensive business case that details what we tried to do manually, when / why we hit diminishing returns, what other solutions we evaluated, what “unintended consequences” the purchase may have on our tech stack, how and when we plan to measure, what other stakeholders have signed off, and how we landed on the price.

Joe: The danger for sales people today is that they get relegated to contract jockeys. But reps can still add value by investing the time in understanding what we are trying to achieve with the product, suggesting use cases, and aiding in the business plan by sharing how successful customers have measured impact. They can also be our internal advocate. For example, I talked about the company that refused to do a paid trial. That rep never took our request “up stairs.” He just said, “We don’t do that.” If he’s not our advocate pre-sale, then there’s no chance he’ll go to bat for us post-sale.

Joe: Figuratively, they dump their entire product feature set on my desk and ask me to tell the what’s most important to me. In other words, they never take the time to understand what I’m trying to solve, and then apply their expertise to convey how their solution can help me achieve that objective. Instead they talk about features.

Joe: My network is my most precious asset. I trust their opinion more so than any review site or analyst firm, though review sites and analyst firms are helpful in rounding out an internal business case. I ask questions in my various CMO-type Slack groups and private message marketers that I admire. We’re a tight group. If you sell to us, you should think hard about customer marketing. Because the backchannel is noisy!

Thanks Joe for some great insights on your thinking as a buyer!
Chances are, if you are in Marketing, you know of Meagen Eisenberg. As CMO of MongoDB (and an advisor for us at Nudge) she is a prolific speaker on the art and science of modern marketing. She has built industry-leading revenue operations at both MongoDB and DocuSign, so has a lot of experience in evaluating and purchasing solutions that are on the cutting edge of the industry.

I had the pleasure of sitting down with Meagen to chat about how she buys for the latest installment in our #HowIBuy series that looks at sales from the buyer’s side of the table.

Here is what Meagen had to say:
To set the stage, can you tell me a bit about MongoDB, the stage that you’re at as a business, and your role within the organization?

**Meagen:** MongoDB is the next-generation database and development platform that helps businesses transform their industries by harnessing the power of data. Our core technology is open source and we sell a variety of products along side that. I’d say we’re a late stage startup, not tiny any more, but not a huge enterprise just yet.

As the CMO, my role in the buying process varies quite a bit. Sometimes I’m the champion, sometimes I suggest that my team evaluates a product, sometimes they will find a great product and bring it to me. I will sometimes also find products that I think sales can get a lot of value out of, and I’ll take that to Carlos, my counterpart in sales, and suggest that the team evaluates it, or perhaps even that we split the budget for it.

What do you generally spend money on in any given year?

**Meagen:** A good portion of budget focuses on headcount and software; we currently have more than 23 pieces of technology in our marketing stack. We spend a small amount on data, but it’s not a big part of the overall spend. One thing I think we probably spend less on than others is services. I’d rather have my team learn the ins and outs of a platform and even do the implementation of a product themselves in order to know its inner workings really well.

It might take a bit longer, but it’s a tremendous advantage for us to have those skills in house down the road, and it’s a skill that person can take with them to their next role. When I hire, the desire to learn, and the initiative to pick something up and figure it out is something I look out for.

When we do hire for services, we are usually hiring for “arms and legs”. We know what we want, but need a little extra bandwidth to get it done. It would be rare for us to hire for services where we didn’t deeply understand the underlying product.
How do you discover what is “out there” in terms of new solutions and ideas that might be worth exploring?

Meagen: The single biggest source for me is my network. I have a great network of peer CMOs and heads of marketing, and within this network we talk a lot about what’s out there and what works. I speak at quite a few conferences, and I’m always on the lookout for interesting approaches to solving problems or removing bottlenecks. Similarly, I advise a fair few companies and many startups are in a wonderful position to try out new and highly innovative solutions. I learn a lot from what they are using and what problems it is able to resolve. A fourth source of new ideas for me is the VC community. I have a fair few VCs in my network and they will often ping me with companies they are evaluating to get my perspective. I suspect I learn as much from these interactions as they do.

Out of the solutions that are out there and potentially interesting, how do you decide what to look into now? How do you set your priorities?

Meagen: At the top level, our company has a set of initiatives that general resolve to revenue targets and reach to developers. I work very closely with Carlos, our CRO, and we evaluate where the bottlenecks are in the overall process and what we want to prioritize. Bottlenecks often have multiple ways of being dealt with, so between Carlos and I, budget and headcount will sometimes move back and forth as we hone in on the best way to grow the business.

As an example, we recently had a growing backlog of qualified leads (MQLs). We looked at a number of ways of dealing with the challenge, including everything from just tightening criteria, bringing in predictive scoring as a solution to better prioritize, hiring an outsourced telemarketing team to qualify, using technology like Conversica to automate some of the outreach, or accelerated hiring of sales. Obviously, depending on the path we choose, the headcount and budget might fit better with me or with Carlos, but the most important driver is resolving the bottleneck and harnessing the opportunity.

Given a particular bottleneck that you’re looking to resolve, how do you evaluate the possible solutions?

Meagen: My network is a huge part of how I evaluate solutions. We were recently looking at a territory planning product, and we first discussed as a team with Sales Operations, then Lars Nilsson over at Cloudera to get his opinion. I pinged Suku Krishnaraj at Sumo Logic, and he was evaluating similar tools, so wanted to hear what my conclusion was. The point I’m getting at is that the back-channel view of solutions is the main source that I turn to in any evaluation.
What do the best sales people do that helps you at any part of your buying process? What do you wish more sales people did?

Within our team, the trial is key. It’s not that we wouldn’t buy something that we had not already tried in our own environment, but the back-channel conversations would have to hit a very high bar and convince me that it was unequivocably the better solution. In creating evaluation criteria, we will dig into lots of blogs or references, but the references are mainly to show us use cases and give us ideas of what problems the solutions can solve. We’ll look closely at price and are comfortable taking a risk on an earlier stage solution if we feel that they will work hard to match their solution to our needs. We don’t really believe in the “next quarter” type of roadmaps as we’ve been in software long enough to know how that works.

Meagen: I generally try to limit time with reps from vendors. I’m really over the gifs, funny lines, forwards of past emails, and all that. I can smell the tactics almost instantly, and delete them just as quickly. Good salespeople are able to “quarterback” and get me the resources I need. Sometimes that’s another CMO with a specific use case that I want to talk to, and sometimes it’s deeply technical resources for my team to work with. However, we usually have a very good idea what we want and how it fits in. The discussion on my business, my top 3 initiatives, etc, is just a waste of my time.

Outside of that, it usually takes a warm intro. If something comes in from my trusted network, I’ll definitely take a look at it.

Meagen: Obviously we all learn a lot online. With that, and with access to a network of peers, the business world is becoming so much more transparent. It’s almost Yelp like right now, there’s no hiding. Customer experience matters, and your ability to deliver to other CMOs like me matters. Find a bottleneck that you solve or growth opportunity, solve it well enough for other CMOs that they’ll endorse you, and make it really easy for my team to prove that you can also provide growth ideas or solve that bottleneck for us.

Thanks so much to Meagen for sharing some great insights into how she buys!
If there is an executive who understands the art and science of customer success better than Jocelyn Brown, I have not met them. As the newest discipline in the SaaS world, customer success lacks the history and patterns that make leadership easier, but Jocelyn has thrived in the role, leading the customer success organization at Allocadia.

For the next installment of Nudge’s #HowIBuy series, I caught up with Jocelyn and got her perspective on how she thinks about her priorities, and how she buys
Jocelyn, first tell us a bit about your Allocadia - what do you provide to the market? Also, give us a sense of how large you are as a business so we can put your thoughts on buying into a bit more context.

Allocadia is the leader in Marketing Performance Management (MPM) software, helping marketers run the business of marketing. Though we are a startup we serve global enterprise organizations like Microsoft, VMWare, Juniper Networks, Red Hat, and more, who leverage our platform to manage marketing plans, investments, and results. A great example can be found in this recent Forbes article about how Box uses Allocadia to invest their budget dollars with confidence on their journey to ROI.

What is your role within the organization? What kind of things do you spend money on throughout a year?

I am the VP of Customer Success so most of my budget is allocated to a team of talented people. After that, I invest in technology made specifically for my team and pay for some of the technology that supports other functions as well. I also have program spend related to customer marketing and occasionally services to support that. I am a direct buyer on a few things and an influencer on a bunch of other stuff.

Customer success is such a new area, let’s talk about how you learn about the latest developments. How do you discover new ideas, concepts, or ways to solve problems?

My network will always be my first and best stop for finding what is out there, either directly through a recommendation or because much of the content I consume is also curated by that same network. I also attend conferences and read general industry blogs and publications. I especially take notice when a company or person that I admire calls out a particular tool.

When a decision is made, how does that happen? What’s your role vs. the role of your team?

My role in the decision is generally related to the acuteness of the pain that I am feeling or observing. I am never buying technology, but rather the solution to a problem that I have now or anticipate having as we scale. I will also generally stick my nose in if the output will be seen or experienced directly by our customers. My front-line leaders have a significant influence over my decision. A tool is no use to me if I have no one to manage it, so I need to see the ownership or ongoing maintenance of a tool or program fitting into someone’s role or interest. Otherwise, I simply won’t be moved to action. If I am going to use a tool or leverage a service, I want to be using it to the level where I would happily advocate for them. It’s important that a purchase both solves a problem for my team or my customers, and fits well into my organization.
How do you prioritize what initiatives are “now” and what are “later”?

Jocelyn: Priorities are influenced first and foremost by my team, as it relates to our #1 priority, our customers. I have a running list of ‘what’s’ that I am keeping tabs on and that alone can put something in my top 3. However, the most important initiatives, the ‘now,’ are pretty much always going to come from the team. First, I need someone to own the solution long term, and second, we need to be solving a problem that has bubbled to the surface either through customers asking for something or the team not being able to deliver the experience that we want for customers.

If you've prioritized a concept and then need to select a vendor, how does the evaluation happen? What do you most value in the evaluation process?

Jocelyn: It’s interesting. My last few purchases have not really been head to head competitions. If you are solving my problem, I have some validation from my network, and I trust that you are invested in my success, I might not look at anything else. That said, I have done both free and paid trials. I am happy to put some skin in the game on an evaluation. If we get to that point I am already 90% of the way there but typically need to prove something – for example, how you play with the rest of my technology and/or process environment. Videos and case studies play a part very early for me. In the later stages of my decision, I need to know if we can work together and work through whatever bumps in the road there might be.

What is different about buying today than buying a decade ago?

Jocelyn: The ability to get feedback from a broad network is so much easier today. Within an hour I can have opinions from 5 or 6 trusted peers on something I am struggling with. I can also find out a lot more about not just the company but the people who work there and the people who advocate for them. I probably do more research on people – and through people – than I might have a decade ago.

Where do salespeople play a role in your overall buying process? What is the most valuable thing a salesperson can do in selling to you?

Jocelyn: I am buying the solution to a problem. Understand what that problem is and speak to that. I am very open with sales people about what I am trying to accomplish and where I am in my buying cycle. I will give people an out on their investment of time so once we agree to continue then we have a bit of a contract. Until you speak directly to solving my stated problem I am not interested in what else you can do for me.
What is the biggest mis-match between what you need and how salespeople try to sell to you?

Jocelyn: One situation I find frustrating is to receive the generic pitch after I have spent time to tell you what I am trying to accomplish. I understand that new people will be involved in the sales process, but they should have some knowledge of what I asked for and respect my time enough to lead with that, or at least ask permission to show me other things. If you make me sit through too much that has nothing to do with me, I will tune out. Also take care in how you speak about customers. Being a CS professional I am super conscious of how and when people talk about their customers in a pitch.

How do you leverage your network in understanding the landscape or individual vendor offerings?

Jocelyn: I am genuinely curious about how people are running their operations so I make time to keep in touch with what people are up to. Sometimes I ask customers about their experience with other CS groups to identify new opportunities to improve. It is not hard to strike up a conversation with a peer when you start with ‘your customer told me that you do this really well.’ If I am down to a final decision I will just ask directly about their experience.

Thanks a ton for sharing your experiences and perspectives, Jocelyn. Very much appreciated!
For the next article in Nudge’s #HowIBuy series, I had the pleasure of chatting with Cheryl Kerrigan, who is the VP of People at BlueCat. I have known Cheryl for many years, as we used to work together at Eloqua prior to her role at BlueCat.

I’ve always found Cheryl to be one of the most thoughtful and strategic HR executives out there. Her view on how businesses can best understand, grow, and develop their people has always been enlightening for me, and her perspective on buying was equally so.

I hope you’ll enjoy Cheryl’s thoughts on her buying process as much as I did:
Cheryl, tell us a bit about your company to set some context for everyone – what do you provide to the market, and how big of an organizations are you (roughly)?

Cheryl: BlueCat is an enterprise DNS solutions company that helps corporations manage and secure their networks. We are a global organization quickly approaching 400 employees across North America, Europe and Asia.

What is your role and what kind of things do you spend money on throughout a year?

Cheryl: My role is VP, People and I think a lot about how to hire the best talent and engage them as part of their journey at BlueCat. The People Strategy relies on technology products (anything from the basics such as the technology we use to pay employees all the way to how we capture information on what an employee is feeling about work on a given day). Technology is a big piece but I also spend money on leadership training, recruitment events, job boards, events for employees to just name a few. Honestly it seems every day I am approving an invoice for a spend!

Let’s look at how you learn. How do new ideas and concepts come across your radar? How do you find out about what’s “out there”?

Cheryl: I’m inquisitive by nature and also am comfortable being an early adopter of something if I can see the clear business value. I read a lot and subscribe to several blogs about HR. The HR tech community especially in Toronto is small and I find my network very willing to share about their experiences and what solutions work the best for them.

Over the last few years there has been an amazing community of HR thought leaders and meet ups that have been really instrumental in pushing the People function to be more innovative and I have learned so much from being a part of that. The best way that I learn is by having a lot of conversations with people who are “breaking glass” and trying new things. I have been really fortunate in being put in touch with some great companies and vendors that are elevating the People function and making it more efficient.

For example, I was looking for a tool to be able to better understand employee engagement and was introduced to someone from my community that was solving that problem. I was able to help influence the direction of that tool and really partner with the vendor to help shape what we needed.
What role do you play in the decision process? What role do your front-line leaders play in the decision process?

Cheryl: I am ultimately the one that makes the decision. However, I will not adopt a new solution without involving my “trusted advisors”. I seek out those leaders in the organization and bring them along in my process so that when we change something or implement something they have had a chance to ask questions and be a part of the process. As HR professionals we rely on ensuring that our leaders are supportive and I have seen many HR projects fail because the HR person didn’t take the critical step of involving others. The biggest suggestion I can give when implementing something that the entire company needs to use is to not make the decision in a vacuum.

How do you prioritize what initiatives are “now” and what are “later”?

Cheryl: My approach is to figure out what problem I am trying to solve and investigate whether there is a solution that can help address it. I feel often that HR people are bombarded by the “latest and greatest” products and the best advice I can give is to not get caught up in that. When I joined BlueCat a couple of years ago we didn’t have much infrastructure as far as technology to support our employees. One of my first initiatives was to survey our employees about where they felt things were lacking and look for solutions to address. In HR you fail by not knowing what your clients (internal employees) are looking for and a piece of technology won’t solve anything unless you can understand how it impacts the entire employee base and can point to the problem it will solve.

How do you evaluate competing solutions? What matters in an evaluation?

Cheryl: The biggest one is talking to others that have used the solution. References on the company, the services and response time they provide is the most important to me. I want to hear from other users about their experience. Free trials are also critical. A company that makes it easy for you to run a pilot program will always be my preference.

I think that as HR professionals we are often hesitant to be the first to try something new but throughout my career I have really benefited from being open to new ideas and trying things out on a pilot basis. Being open to new ways of doing things and not being afraid to be an early adopter is key.
What is different about buying today than buying a decade ago?

Cheryl: Sheer volume of products. I am not exaggerating when I say I get contacted by vendors 4 times a day. It’s a lot of noise to cut through.

Where do salespeople play a role in your overall buying process? What is the most valuable thing a salesperson can do in selling to you?

Cheryl: The best salespeople I have dealt with are the ones who are collaborative in their approach. It’s those professionals that understand the multiple hats an HR professional wears and are there to consult and advise on how they can help you. One of the best experiences I had was when I dealt with a company and they let me run a free trial so I could see how their solution could help me. The differentiator for me was that they didn’t just “turn it on” and walk away. They worked with me to help give me time back in my day and make a process more efficient. They took feedback and were extremely consultative and gave me value where I wasn’t expecting it. I wish all of my experiences with sales were like that.

What is the biggest mis-match between what you need and how salespeople try to sell to you?

Cheryl: Them assuming what I need without asking any questions. OR when I can tell they are just going off a script.

How do you leverage your network in understanding the landscape or individual vendor offerings?

Cheryl: This is my biggest asset. I have access to a wide community of HR professionals in similar environments where we are constantly sharing our experiences with vendors and solutions. I was recently reminded of how critical these people are to helping me shape decisions. We have a Slack channel set up so we can ask questions and get responses in real time. I wouldn’t make a decision without asking them first.

Tremendous thanks to Cheryl for providing these insights into how she approaches buying!
Shortly after the original #HowIBuy article launched, I represented Nudge.ai on a sales panel discussing that exact topic – how executives actually go about buying. Jay Hedges #HowIBuy.

Jay Hedges was on the panel with me, and I was struck with how different his approach was from mine. Jay’s respect for the art of selling and his methodical approach to evaluating new ideas and bringing his team along in the process makes this one of most interesting #HowIBuy articles yet. I hope you get as much insight from Jay’s views as I did when speaking with him.

Here’s Jay on how he buys:
Jay, great to be speaking, I learned a lot from you on our panel discussion and I’m hoping to capture much of that here. First, before we get into buying, can you tell us a bit about Uberflip to set context of what you do and what size of company you are?

Jay: Uberflip is a platform that combines the art and science of marketing allowing marketers to get the right content in front on the right buyers at the right time. In terms of size and growth, we’re a high-growth SaaS company, we’ve grown from 60 to 120 people over the last year.

Definitely an intense phase of growth. What is your role within Uberflip? With that role, what do you and your team spend money on throughout the year?

Jay: As the SVP of Revenue, all of business development, sales, and customer success roll up to me. It’s about 70 out of our 120 people. In spending money, I’ve got a bit of a different view than some people; the bulk of what I spend is on things that will make individual contributors on my team happier and more productive. I spend much less on things that will help me as a manager.

I believe strongly in the connection between user satisfaction and productivity, so things like UI are very important. We recently changed our sales automation tool and our web conferencing tool because the team felt they were easier to use and made them appear more professional. As another example, we’re in the final stages of evaluating some call recording and coaching technology, and that’s been driven by my account execs who are eager to learn and improve themselves.

How do new ideas make their way into your team? How do you and your team learn what is out there and what is possible?

Jay: There are three main ways that we discover new ideas, and I’d say it’s roughly balanced between the three. The first is good sales hustle. We respect the game, the hustle, and persistence. A good call or email will get our attention, and even be shared internally as a learning opportunity. Second is word of mouth and our networks. We talk with lots of other companies and have a good sense of what they are using and what works. On top of that, third, of course, is good content that surfaces in our social feeds or on the blogs and newsletters we read.

Lots of ideas come from junior employees on our front lines. The younger folks seem to be more of the mindset that for any problem they should be able to find a solution that tackles it, and they are eager to bring those ideas forward.
You mentioned on the panel that you have a fairly structured buying process – can you tell us about that and what’s involved?

Jay: The hours in a day are limited, and we’ve gone through this before, so we’ve developed a process that works and we generally stick with it. An idea will make its way to me and my leadership team, and we’ll make a decision on whether we should look a bit further. We’re generally pretty liberal at that stage with what we take a look at. If we decide to have a look, we’ll choose a person to look at the tool as the main evaluator. This often an up and coming junior member of the team, and the overall opportunity is great leadership experience for them.

The first meeting will usually be with me and the main evaluator, but I’m really only half there – the key person is the evaluator. They’ll lead the evaluation, and if they decide to move forward, we’ll broaden out to a few more folks in the organization, or perhaps across organizations if warranted. The results of this effort are brought back together by the main evaluator, and if things are looking good we’ll progress through technical details and terms.

From there it’s back to me for the final decision, or, if it’s larger, I’ll bring it to our president. Overall it’s a process that lets us look at new concepts efficiently, while also covering a lot of the drivers of what success will look like in our business.

That makes sense in terms of the evaluation of technology and fit – can you add a bit of detail about how you think of ROI, budgets, and the financial side of the decision?

Jay: We are small, nimble, and high growth, but being lean is a core value. If we’re in the middle of a year, getting new budget is pretty much impossible. If the business case is good enough, we can pull money away from something else. It’s not as easy as it sounds, but it’s not impossible.

How does your own network of peers play a role in the evaluation process?

Jay: My network is great for validation. If we are enamoured with a product internally, we’ll just go ahead, but if we’re on the fence we will ask around. References and case studies from the vendors are not really all that important, although if I can’t find a reference in my own network there might be a place for it.
As a sales leader and someone being sold to, you obviously have a lot of insight into what makes a great sales person. What do you look for in sales people who are selling to you?

The best sales people ask good questions, listen, and adapt to our process. They are able to bring in people and resources on their end to help out when needed. In general, I’d say they help quarterback the internal process more than they are really “selling”. They focus on helping, teaching, challenging, and only then selling.

The importance of the ability to reach out and challenge, rather than just wait for leads is something that I think is underappreciated in sales people. We need to move more and more to personalized and valuable outreach, more of an exchange. Don’t ask for 15 minutes of my time, ask me something about my business that really makes me think.

Thanks for the great insights Jay! I learned a lot in our conversation.
One of the most fascinating things for me in doing the interviews for Nudge.ai’s #HowIBuy series has been the differences in how people approach buying based on the stage of the company. Late stage, large company executives have an existing, if legacy, stack in place, and are looking to push the envelope, extend, or reinvent. However, early stage execs are often building the core stack in various areas of their business.

Jess Weisz, COO of SoapBox truly exemplifies the latter. She’s smart, thoughtful, and refreshingly honest about the challenges of building the core stacks for each part of her business given the realistic constraints of the startup world.
Great to be talking Jess! Can you tell us a bit about SoapBox first to set the context?

SoapBox makes software solutions that help leaders, managers and employees have conversations about the things that matter most to motivation and performance. From one-on-ones to team-meetings to company-wide conversations, SoapBox builds a culture of healthy communication.

We’ve found that companies who are able to match the right work with the right skill are the ones that are the highest performing companies. We help manage the human element of that challenge more so than just the unit of work.

And how about yourself, what is your role within SoapBox, and what do you and your team spend money on throughout a year?

My role is COO – so I have responsibility for Marketing, Sales, and Customer Success. We’re a fairly early stage business, and as such, I’d describe our spending as “frugal as $%#@”. We are very thoughtful on how we spend money, and my favourite is to spend it on people. That being said, we’ll spend on tools that enable us to be better at our jobs and more effective.

Outside of headcount, we’ll spend mainly on systems, but also some on data services, outsourced lead generation, and a few other areas. I’d love to do more in terms of team training and development, but that is hard to fit into the budget. We are always looking to find ways to get extra value out of any buying process, so team development opportunities are a way to catch our ear creatively.

How do new ideas find their way to you? How do you learn what’s “out there”?

It’s all about who I talk to. I do very little reading of general business press, to be honest, as I find it’s often just a bunch of platitudes. For me, it’s my network that’s the main source of new information. My team does do a fair bit of reading to understand the typical tools for a given task, and that’s a great source of input. I’m more likely to be at a conference talking to someone who just presented and learning more about their approach and tools.

What is the dynamic within your team once an idea seems interesting? How do ideas make it through your team’s thought process?

The interesting thing is that the default is for an idea to go nowhere. There are so many great ideas out there that we could do, but the time, energy, and money to actually do a certain idea is pretty limited, so the default is not to do anything.
As a startup, there’s obviously a lot going on. What makes an idea a “now” idea vs. something to keep in mind for later?

Many of the tools that we have actually ended up implementing have ultimately been driven from our top leadership team. It’s often not so much of the idea as the fact that we need to prioritize solving that particular problem at that moment in time.

How do you and your team evaluate tools and solutions?

Jess: There are a lot of ideas that could be worked on. What brings something to the top of the list is usually a combination of three factors. First, the need is more and more exasperated. Think of it like 100 bee stings, each one making the overall pain seem greater. Second is having a bit of air space to get something implemented as we are always very busy as an overall team. Third is generally an external driver such as a product launch that this is at least a partial dependency for. When those factors come together, an idea will move into the “now” bucket.

For some solutions where there’s more of a clearer set of multiple options, we’ll go through more of a structured process. Fundamentally we need to develop confidence in the solution through either a trial or our own references.

Interestingly, for most of our solutions, the core value came down to integration with other systems for either data or workflow. In those cases, they were all paid engagements prior to implementation. The key effort was the integration effort on our side, not the solution cost, so we were okay to commit prior to seeing the fully integrated end-to-end solution.

What can sales people do that best helps you and your team?

Jess: The great sales people are great resources. They are smart, know their stuff technically, and can get me the answers I need quickly. That brings a lot of confidence in the company and, by proxy, the solution.
Your network is clearly a key part of your evaluation process. How do you curate who is in your network and where the ideas come from?

What advice would you have for sales people trying to sell into an organization like SoapBox or an executive who thinks like you?

I don’t know of any things that we have bought that originated with a cold outreach. Some we’ve kept in mind or had a quick look into, but none that have gone through to purchase. For the ones that did get through to a first conversation, creativity and fun seemed to go a long way – as an example, a t-shirt vendor sent a witty email with a picture of their CEO wearing a t-shirt with a SoapBox logo on it. That won points for creativity.

Jess: I’d say my network is formed accidentally, but curated deliberately. When I find people I can learn from, I seek out conversations with them and stay in touch. It’s not anyone role-specific, it’s people who have done well, have a broader view on life, and generally avoid saying stupid things.

Jess: I don’t like feeling I’m being sold to. It’s a lot like being in a clothing store, I like browsing without too much interruption, but when I need assistance I want someone who knows their stuff. I think the metaphor translates over to B2B buying. I want someone knowledgeable to guide me through the process and push me to ask questions that I have not asked. Someone who can do that without making it feel like they are “selling” me on something is the ideal sales person.

Thanks for some great insights on your thinking Jess!
I was recently on a panel at a sales event with Danielle Cerisano, VP Finance at League, and she had the audience captivated with her detailed and clear description of how she is involved in the buying process.

She was willing to share her insights for this next installment of Nudge’s #HowlBuy series. For anyone selling anything, the perspective of the head of finance is a crucial one to understand. It is also commonly misunderstood or thought about too late.

Hopefully, Danielle’s perspective on her role in buying will help you avoid any such mistakes:
Danielle, first tell us a bit about League to set context. What do you provide to the market and (roughly) how large of a business are you?

Finance has a very interesting role in almost every buying process. How do you approach thinking about buying processes and how you are involved?

Danielle: League is revolutionizing the employee benefits space, so employers can offer benefits their team will actually use. Our digital experience works to create a culture of health and wellness at your Company, without the administrative hassles of traditional benefits programs. League unlocks employee benefits to give everyone the power to act every day and live healthier longer lives. We’re post series A and post revenue startup Company.

Danielle: I like buying. I know that sounds weird coming from finance; I mean, don’t all finance people hate spending money? I like buying because often the tools that we end up saying yes to save us or make us money somewhere else. And THAT I like even better than not spending money.

The way I approach the buying process is by asking a lot of questions! Here we go...Was it budgeted for? Ie; is this is table stakes product that we need in order to run the business? If so is this the best and most cost effective out there? Does it have a tangible or intangible ROI? If it does, do the benefits outweigh the costs at the stage of the business we are at? If you could only have a few products or tools in this particular department, would this be one of them? Ie; if cash gets really tight would we cut this one? (spoiler alert: answering yes to this last one means I don’t think we should buy it even when cash is not tight)

I am involved in the beginning of the process (ie; budgeting time) and the end (ie; decision has been made but I need to approve the additional spend). This is a fundamental mistake most champions make in the buying process. I don’t need or want to be involved in every step along the way, but get me in the know earlier so at the very least I can ask all those annoying questions above before it’s in final stages on XX 31st of the month.
ROI is obviously a critical part of the decision process that you’re involved in. What makes a good vs poor ROI argument in your view? Do you find that most people who come to you with a proposed purchase are experienced at presenting a good case for an ROI?

How do you think about budget? Is the response “we don’t have budget” real, or an excuse? Do you think of a budget as tightly allocated against projects, or a more fluid “bucket” that can be moved around throughout a year?

Danielle: Shockingly few salespeople come to me with ROI calculations, it would be refreshing to see this done for me. A good ROI argument is one that is simple and straightforward. If it’s complicated or difficult to understand, this is a red flag. Not to be confused with an intangible ROI, you can still have a very simple ROI argument that does not necessarily have numbers attached to it. I urge salespeople to dig in at their own Company if they are finding ROI is holding them up. Maybe the value proposition doesn’t hit the mark quite yet and you can help your product and management teams with valuable prospect feedback.

Danielle: When a prospect says they do not have budget, in most cases, I believe this is an excuse. Budgets are fluid, and I don’t believe they are the real reason that people do not buy. It’s often something deeper and as the salesperson you should dig. Here are the real reasons why your prospect “does not have budget”:

1. The product is too expensive for the stage and size of the Company. The product might make sense when they are scaled but for now, the costs do not outweigh the benefits. Keep in touch as they grow, but move on. (**As an aside, if this lead made it to negotiations or even to demo, someone is doing a bad job at qualifying leads. Don’t waste your valuable time here. )
2. Someone with buying decision power does not understand the ROI and the ultimate value that the product brings.
3. And the worst of them all, individuals with buying power do understand the product but do not believe there is ROI or value. This could be a serious product market fit issue.

Your champions are your greatest assets, equip them with the tools to talk to Finance. I have no doubt in my mind that when a champion wants to buy a product, it’s going to help them do their job better. My question is how much better? Is it worth the cost? Help your champions speak my language and answer my questions before I ask them. Mark my words, I am going to try to calculate an ROI to justify the purchase, so if this is already done for me then all the more chances that I don’t screw it up by not having all the right information!
What sales assets are valuable to you? What are you looking for in assessing a company via their sales assets?

Danielle: Finance people are sceptics naturally, it’s our job to be, so I want see that some kind of due diligence has been performed on a new product we considering. This means yes, case studies and testimonials. I understand that not every product is going to fit in the same way at each Company, but I at least want to see that you have a happy customer. Not a great sign if you don’t. And if the Company is too young to provide these references, than I want a ridiculously good price for being an early adopter.

What is different about buying today than in the past?

Danielle: Sales people have gotten way more creative in the past few years and it’s pretty awesome to see. Videos, an immense amount of research on the Company or myself, and keeping up to date with size, growth stage, and challenges, are all things that have impressed me in cold calls or emails. Do your homework, it goes a long way. I try my best to answer emails from sales people but it’s the lowest on my list of priorities. You’ll have a much better return rate with creativity. And knowing my friend/old colleague/mother from blah blah blah with no other compelling research is a cheap jab…do better.

What is the biggest mis-match between what you need and how salespeople try to sell to your organization?

Danielle: The biggest mis-match is salespeople not understanding the pain points at our organization. This leads to selling with blanket statements and assumptions that don’t apply to the our Company. You only have a minute or so to ensure you sound credible on a sales call, so be sure to ask the right questions up front or do enough research on the Company before getting on a call.

How do you leverage your own network in understanding the landscape or individual vendor offerings?

Danielle: I rely heavily on my network to understand what products are out there, what’s working for them, and what is not. Individual networks are an underutilized tool in the sales process. A sales person once said to me, “I see you are connected with so and so on Linked-In. If you want, give her a call to ask about her experiences with our product.” This was genius. Whether he prepped her or not for my call, my perception was that he didn’t because of the casual and personal nature of the reference. It all felt very natural and helped to develop trust.

Thanks, Danielle, for great insights into how you are involved with buying. Getting the perspective of finance leadership is tremendously valuable!
Out of every chat that I have with sales leaders on their challenges in selling, selling to CTOs is often one of the most perplexing. CTOs like Quin Hoxie at SwiftType don’t buy like other execs.

I had a chance to chat with Quin lately for Nudge.ai’s #HowIBuy series, and the combination of his CTO mindset, along with the speed/risk profile of being an early stage, high growth business led to some interesting dynamics in how he thinks about evaluation, timing, risk, and buying.

I hope you enjoy Quin’s perspectives in reading as much as I did in interviewing.
First, let’s set some context on SwiftType. Tell us a bit about the company – what do you provide to the market and what stage are you at in terms of growth?

Quin: Swiftype provides a couple of search-based products: Enterprise Search and Site Search. Enterprise Search allows a company to connect all of their various tools — think Slack, Dropbox, Salesforce, GMail — and then make them searchable in a unified interface. Site Search is a way to add customer-facing search to websites. We are a 40 person startup in San Francisco with a mix of engineering, support, sales, and marketing.

And as for yourself, Quin, what is your role and what kind of things do you spend money on throughout a year?

Quin: I’m the CTO and one of the founders of the company. I primarily spend money on products and services for engineering, but as a small company, I also end up being involved in the vetting or approval processes for a large variety of other purchases across teams.

Let’s start into your buying process. How do you find out about what’s “out there” and discover the latest solutions that might make your world better?

Quin: I used to read a lot of commentary from the startup community (places like Hacker News and founder groups) which tends to revolve around new products either from a pitching or consuming standpoint. These days, I don’t keep up as much directly, so I rely on the team here to surface things that may be interesting. This actually works really well for me, as it is effectively a whole group of people whom I trust discussing new products related to our business. If someone here is lobbying for us to try or buy a piece of software, it means they’ve already done some research and see real value.

What role do you play in the decision process? What role do your front-line leaders play?

Quin: In years past, I did a lot of the purchasing start to finish. Everything from identifying the need, finding options, vetting them, negotiating, and ultimately paying. Today, I rely heavily on the team to take us through most of that process. They identify needs, find options (usually from their networks), and work through the vetting process. Being curious (and skeptical), I usually like to be clued in to the evaluation so that I can understand the approach while it is happening, rather than retrospectively when we’re trying to make the purchase.
When an idea seems interesting, how do you prioritize what initiatives are “now” vs. what are “later”?  

Quin: To me, a problem is either big enough to solve or it is not, so I don’t like to push things off based on many factors. The one thing that will cause me to bucket something as “later” is the cost of implementation in time and internal resources. Since we are a small company, opportunity cost is always on my mind.

The prospect of needing a product today but it taking months to set up is often too hard for me to digest. This may seem shortsighted, and I’m sure we’ve made some investments later than we should have on my watch, but I think we have a clever group here and can usually find a simpler, quicker solution.

As you go into an evaluation, what types of evaluation approaches do you actually leverage in your process?  

Quin: I’m a big fan of getting my hands dirty actually using a product, usually in the context of a free trial. I’m also not against a paid trial in most cases. I tend to be a skeptical person, and while there is a lot of amazing software out there, I’ve also found that many products over-promise. You’ll never find that out with a demo or a video. For me, the two ways to discover if a product actually delivers is to try it yourself (with as near to a production use-case as you can) or to ask someone you trust who has used it.

What is different about buying today than buying a decade ago?  

Quin: I’d say the biggest difference is that it has become easier to evaluate products, often without ever talking to a salesperson. I think this makes sense, because the “adopters” of software inside of companies are not always the same as the buyers any more, and that is a powerful vector if you can get the product into their hands to try.

If you decide you need a solution from a particular category today, you can likely start trials and actually use all of the competing products in the space immediately. This is a great trend for consumers and something that definitely didn’t exist looking back.

Where do salespeople play a role in your overall buying process? What is the most valuable thing a salesperson can do in selling to you?  

Quin: For most purchases, I interact with a salesperson as late in the game as they will allow. This means that by the time I’m engaging with them, I have a pretty good idea of what needs to happen for the process to be successful. From my standpoint, this is a good setup on both ends as we can cut through much of the boilerplate they may have in their usual process.
What is the biggest mis-match between what you need and how salespeople try to sell to you?

Where I see a salesperson adding the most value is basically augmenting my evaluation — I’ll usually do everything I can on my own and then go to them with very pointed needs or questions to fill in the gaps. I’m happiest when they are succinct and direct.

Quin: I see a lot of process for the sake of process when I talk to salespeople. As mentioned, I usually jump to the end of their script by doing a lot of my own research and evaluation. I don’t try to hide this — I’m very up front about where I am in the process and what I need from them to help move it forward. Still, I often find myself being offered demos or marketing collateral in response to these conversations.

How do you leverage your network in understanding the landscape or individual vendor offerings?

Quin: There have been times, especially in the early days of Swiftype, where we needed to look at services in an area where I had little to no expertise. Looking to a network of other founders for advice was critical for these decisions.

A good example for us would be selecting a CRM. I remember surveying options and thinking that some of the newer offerings looked polished and lightweight, which appealed to me because I was still learning about how our sales team would operate. We got numerous recommendations to “just use Salesforce” and eventually did. It was the correct choice and one of those situations where I didn’t have the right information myself to make the call but people I trusted did.

Thanks for some great insights into your buying process Quin!
One of the most fascinating things that I have found in running Nudge’s #HowIBuy series is the wide variety of buying habits and propensities. To date, many of the executives interviewed have gotten almost no new ideas from cold outreach. That makes today’s conversation with Ruth Zive, CMO of Blueprint, even more fascinating as she talks about new ideas coming to her through high quality BDRs and sales reps.

A great pitch, clearly articulated, and delivered in a manner that cuts through the noise still has a place in today’s world. Especially if it happens to come alongside chocolate.

Here are Ruth’s thoughts on her buying process:
Thanks for taking the time to talk, Ruth. First, tell us a bit about Blueprint, both in terms of what you provide, and how large you are, in order to set some context for the rest of our chat.

Ruth: In a nutshell, Blueprint solutions help organizations build innovative applications that drive digital transformation and disruptive innovation, while mitigating the risk of an ever-changing regulatory landscape.

We are definitely beyond the start-up stage; we are global, with about 150 employees worldwide. Blueprint has enjoyed more than four years of double-digit growth – so growing rapidly, but still small enough that it feels like a fairly tightly knit community.

And as for yourself, what is your role at Blueprint and what kind of things do you spend money on throughout a year?

Ruth: As the CMO at Blueprint, I’m responsible for all Demand Gen initiatives – building early stage pipeline and leveraging all available marketing channels. I try not to overwhelm my team with too many tools – we are pretty selective in what we use. Our programs are underpinned by a marketing automation platform and CRM, and then we have a few other applications to drive productivity.

We spend a good amount on events, as well as analyst relationships. And we are always refreshing our lists, so that is a fairly significant line item. We do not spend very much on services or consulting – and I imagine that budget line will continue to shrink. I prefer to bring as much expertise in-house as possible – and our current team is very experienced and skilled. We target the Fortune 2000, so our market is fairly tight. Because of this, in the coming year, I expect ABM to be a considerable investment as we look to flip the funnel and target more surgically.

How do you find out about what’s “out there”? How do you discover the latest solutions and approaches that might have a chance of making your world better?

Ruth: Honestly – the best gems have come directly through a good sales rep or BDR who was able to cut through the noise and clearly articulate the differentiating value proposition of their offering. There are a lot of cookie cutter marketing solutions out there – what gets my attention are the creative, disruptive approaches that turn conventional marketing wisdom a bit on its head.

Any outreach email that is longer than two sentences and doesn’t directly address my specific pain in a compelling way gets deleted. There have been a few creative pieces of direct mail that got my attention.
Tell us a little bit about your decision process. What role do you, and what role do your front-line leaders play in the decision process?

Ruth: I have a lot of confidence in my team. While I suppose I’m the final decision-maker, I rely on them to scope our needs and determine the best possible approach. I am almost always aware of vendors we are seriously considering, but I don’t generally get involved until the later stages of negotiation. Once in a while, when I see something that piques my curiosity, I’ll flip it to my team to explore. But if they don’t see value, I defer to their judgment much of the time.

How do you prioritize what initiatives are “now” and what are “later”?

Ruth: The state of our pipeline dictates those decisions to a great extent. I am always looking at how it distributes across our sales force – is coverage healthy, are there gaps and opportunities. If, for instance, our pipeline is thin in the UK, I might prioritize an event or conference in that region, or make an investment in a list refresh. We also listen carefully to the market to shift gears as needed. If, for example, we are finding that prospects are struggling with Problem X (could be a particular regulation, a bottleneck in the SDLC, a limitation of an existing ALM tool), I might deploy resources that speak directly to how we solve that problem.

When you’ve decided that something is needed, how do you evaluate competing solutions? What types of evaluation approaches do you actually leverage in your evaluation?

Ruth: I like a free trial. It’s a lightweight opportunity to demonstrate proof. And I think in today’s world, it’s become a baseline expectation of buyers. Even when I’m negotiating with a service provider – I’ll often ask for a 2-3 month ‘trial’ period. And then if the investment is significant enough, I almost always ask for references. Sometimes I’ll seek out references on my own – and email a few of the CMOs of the companies listed on the vendor’s website.

Not those slick, seemingly handwritten (but not) postcards that drive me to a mysterious website – those don’t work. Anything that involves tasty food, or reveals a genuine awareness of my role or interests gets noticed. I once received a beautiful box from Godiva, with a card that called out my chocolate addiction (it’s in my Twitter profile). That showed me the BDR had done her homework and taken time to learn about me. At a minimum – it moved me to read on about what she was selling and to take her call when she followed up.
What is different about buying today than buying a decade ago?

Ruth: Without question, the biggest difference is that today, most of the buying decision can be made before speaking with a live human being. I can go online and learn 90% of what I need to know to seal the deal. Even if there is more to understand, my mind is typically made up before I have a conversation with a sales rep. If a vendor does not have a user-friendly, robust, informative website (or if it is riddled with spelling errors, and looks 15 years old), or if I can’t find any current and credible information about the solution online, it leaves a bad impression. Period.

Where do salespeople play a role in your overall buying process? What is the most valuable thing a salesperson can do in selling to you?

Ruth: Understanding my needs. Not wasting my time. Being responsive and attentive once we are further along in the sales cycle. I like a sales person that very quickly gets to the point, and zeros in on my most pressing challenges. As I said, I delete 90% of the sales emails I receive. The ones that make the cut are usually not more than 2 sentences in length, sound genuine, and speak directly to my specific needs and interests.

What is the biggest mis-match between what you need and how salespeople try to sell to you?

Ruth: Not differentiating. There is SOOO much noise in the marketing space. It’s deafening actually. I must receive 10 emails a day JUST from list vendors. I’m not interested in hearing the same sales pitch over, and over, and over again. Try something different. Think outside of the box. Stand out. Get my attention. Send me food :).

How do you leverage your network in understanding the landscape or individual vendor offerings?

Ruth: I have a network of other marketing leaders I know and trust. I speak with them regularly and I always ask for anything new they’ve unearthed that I should be looking at. A referral from a trusted peer is worth more than any sales pitch.

Thanks Ruth, for sharing how you think about buying, it was very insightful.
There’s something uniquely fascinating about interviewing executives in either sales or marketing for Nudge’s #HowIBuy series. Since they are, essentially, living on both sides of the table as both sellers and buyers, they have a unique ability to reflect on their own behaviour as a buyer.

My conversation with Adam New Waterson, VP Demand Generation at RevJet, was no exception. Adam is a buyer who understands the system, and works his own buying process within it. If you sell to leaders of marketing or sales, Adam’s viewpoint will be one you want to read.

Here’s Adam’s perspective:
Help set a bit of context, Adam, tell us a bit about RevJet and what you provide.

Adam: RevJet is the world’s first marketing creative operating system. We help the world’s largest advertisers run their digital ads, on any channel, using one single purpose built platform. We make the world’s advertising work better without spending more on media.

What is your role within the organization and what, in general terms, do you spend money on throughout the year?

Adam: In my role as the VP of Demand Generation, I’ve got the bulk of marketing, outside of PR and Brand. My scope includes the SDR team, essentially everything before the meeting. In terms of where I spend money, we’ve got our primary tech stack and critical infrastructure like Salesforce, Hubspot, and all the things that we do for advertising and DSP traffic. I own the spend on technology for the rest.

I’m always looking for ways to make our team better, faster, and stronger. I was a marketing technologist in a past life, so I have a healthy respect for many of the tools that help drive sales success. However, I find that many marketeers start with the tech and then try to create a business issue to justify their existence. I like to start the other way, looking first at the issue and then determine the best solution to meet the team’s goals.

Our team is super heavy on personalization, so one of the big challenges for us is how we scale.

How do you find out about what’s “out there” and learn of new solutions and services?

Adam: That’s the dirty secret. It usually doesn’t start with email from a salesperson. I saw your booth at a tradeshow, I heard of you from my network, I saw an ad flit by on social media. If it’s interesting, at some point I will start evaluating, but it will be on the back-burner until then.

As an example, with one vendor we are looking at, I’d say we’re about 75% of the way along in our evaluation, and the first call was this week. I determine your technology’s value much sooner than our demo. However, looking back, I have been tracking their technology for 2-3 years before now having a problem which requires their solution to solve.
Tell us a bit about your evaluation and decision process. How do decisions get made with you and your team?

Adam: I have one person on my team who is mainly tasked with evaluating tech, and it’s his responsibility to evaluate most of our technology choices. When we have a problem or a business objective, he will usually start with an initial swath of vendors, dig in with research, and begin to pressure test the top 3 or so. The initial list can come from his own research or, since I’ve been in the space for a while, I might start him with a few that I’m familiar with and he will add additional business to evaluate.

Essentially he is looking for facts. He helps me really understand the nuts and bolts of each solution’s options so we can make a decision by reviewing product features comparatively. As part of his evaluation, he will often reach out to the vendors in question, and often does a significant amount of his research through the AE. By the time I’m involved in the conversation, it’s usually at the contract phase.

It sounds like you’re not often directly involved with sales. When are you involved? What does that interaction typically look like?

Adam: If the first email I get that is a typical undifferentiated sales outreach, I’ll build a filter in gmail & that sender never again reaches my inbox. I purposefully use an email alias and direct-to-voicemail numbers to make it harder to get in touch with me. Social media is usually the best bet, but I remove connections if an overly sales pitch comes in too aggressively.

The hurdle really is getting my attention. Once you’ve got my attention, I want a really clean demo. Not vaporware, not smoke and mirrors. If you present with PowerPoint, it makes me question what is real & what is roadmap. You might find this shocking, but as a marketer, I’ve marketed and sold things that did not yet exist, so I’m always testing for that in my conversations. We might also get into a conversation of roadmap and futures so I can get a sense of what your priorities and values are as a company.

With a demo, I will often ask leading or open ended questions; it’s a really good way to see if there’s depth based on the answer. In some cases if I’m on a demo with a vendor with a bit of a reputation for telling a story that’s a bit ahead of reality, I’ll push the demo as far as saying “I want to watch you click that”, to test how refined certain areas are.
Once a decision is almost complete, how do budgets and ROI analyses factor in? What are you looking for?

Adam: There’s always a buying committee, but within a certain budget I can spend fairly smoothly. Above those levels, I’ll need approvals from higher up. We think about budget in two main ways. First, we’ve got top level goals, such as launching a new product. Within that, we’ll have allocated rough amounts for media, events, etc. Second, our budget is very much tied to head count. If we’re going to hire people, we’ll budget for the materials needed to support them. That is always a part of our financial model.

ROI is, in some ways, has become a negative term to sophisticated marketers. As someone who has helped build b2b attribution reporting software, I’ve seen the pitfalls that come from strict adherence to ROI. The drive for all things to be tied directly to revenue is certainly worthwhile, but strangling budget for unproven items because they aren’t yet ROI positive can pull your business backwards. That reduces innovation in areas that are not directly provable. Obviously the level of trust to experiment with non-measurables is in many ways tied to the cheque size, but we are very open to ideas even if there’s not a direct trackable ROI.

How does your network help you as a buyer?

Adam: Like we talked about earlier, many ideas have been simmering on the back-burner for years waiting for a use case needing to be solved. During that time, I’m continually talking to my network, listening to what is making an impact for their business, and cataloging away good ideas to use in the future. That is all essentially a vendor evaluation; what is the experience you provide, what’s does enablement look like, how well does the solution deliver? My network is hugely influential in how I evaluate technology and in which solutions I place my trust.

Any final thoughts for top sales people of today?

Adam: I have a lot of respect for a personalized, thoughtful, prospecting touch. If outreach demonstrates an understanding of my business, and my objectives and measurable goals, I will typically reply. I realize the difficulty in all areas of sales, and I want to treat them as professionals. I won’t necessarily take a demo, but I will usually reply. However, in terms of what to investigate and what to go after, the power of word of mouth in my network really can’t be underestimated. Get your customer to speak for you and more people will listen.
Troy Goode, the CTO of Lanetix is a rare breed of exec who is both deeply technical, while also being extremely thoughtful about business.

I had the pleasure of working with Troy many years ago at Eloqua, and now that he has founded and is leading Lanetix, I had the pleasure of talking with him again for this week’s #HowlBuy interview. As with all CTO interviews in the series, it’s a very interesting view on a buying process that is very different than many “front office” execs’ buying processes.

I hope you enjoy the conversation as much as I did.
First, tell us a bit about your Lanetix to set context. What do you provide to the market and (roughly) how large of a business are you?

**Troy:** Lanetix helps commercial organizations digitize their legacy processes – like RFP responses and account planning – via a modern, collaborative platform that they can access from anywhere. Our customers are the enterprises across the globe that make, move, and market goods to the world – including more than half of the world’s top 10 Third-Party Logistics (3PL) companies. At four years old and around 50 employees we are edging out of “early startup” territory.

And as for yourself, Troy, what is your role and what kind of things do you spend money on throughout a year?

**Troy:** As CTO I lead our engineering teams while also filling the role of Head of Product (product management, product marketing, UI/UX) here at Lanetix. My responsibilities include roadmap planning, personnel management, technical architecture decisions, supporting sales engagements, supporting implementations & renewals – a broad cross-section of our company’s needs.

I’m easily the #1 purchaser of vendor products within our business. Our sales & service teams tend to only buy a few tools and stick with them whereas my department is responsible for building a SaaS product and we in turn rely on many SaaS products to help us hit our targets with a lean team – it’s turtles all the way down. With no dedicated IT team I also frequently find myself spot-filling as the resident nerd. I’m responsible for purchasing and renewing dozens of services within our portfolio of tools; we’re probably adding or swapping out a handful of them every month. Those products fall into a few primary buckets:

- Infrastructure required to deliver our product to our customers, such as application hosting
- Tooling that helps us in the process of building our product, like version control
- Tooling that helps us service our customers better, like issue tracking
- Tooling for general organizational productivity & collaboration, like email hosting

And how do you find out about what’s “out there” in terms of new products, services, and tools?

**Troy:** From a large variety of sources – my team, personal discussions with peers in industry, social media recommendations, and (though I’m loathe to admit it) advertising. ProductHunt and Hacker News are two frequently successful vectors for influencing me historically.
What role do you play in the decision process? What role do your front-line leaders play?

Troy: I’m involved in the approval (and often selection) of all recurring spend in my department; in some cases the selection happens without me though I like to be intimately familiar with any tools that will play a significant role in our core architecture.

There are lots of great ideas and solutions out there. How do you prioritize what initiatives are “now” and what are “later”?

Troy: Like just about everyone else our prioritization comes down to an ever-changing mix of three things:

1. Strategic projects to put us out in front of the puck
2. Tactical initiatives that can help us hit goals this quarter/year
3. Fire-fighting

We have to maintain investment in all three categories but the balance changes depending on circumstance.

How do you evaluate competing solutions? What is meaningful to you in terms of ways to evaluate?

Troy: We love it when we have a recommendation from someone we know & trust; in those cases we may not even significantly evaluate competitors unless our specific use case runs make challenges apparent early on. When the decision making process devolves into a dogfight between competitors of similar quality we absolutely leverage hands-on free trials when available – guided demos by a sales engineer are useful when we’re just trying to understand the possibility space but aren’t sufficient when we’re reaching the end of the decision making process. Unfortunately some technology (particularly infrastructure) doesn’t lend itself well to “trialing it;” in those cases published reviews and case studies are incredibly helpful.

What is different about buying today than buying a decade ago?

Troy: I frequently view products & services as far more “disposable” today than I did a decade ago. I’m quick to try new technologies – even from early, unproven vendors – but I’m not interested in high-cost solutions or ones that lock me into a long term contract. I’m looking to pay month-to-month and start cheap, but I’m willing to move fast. If a product delivers value we’ll be excited to explore a longer commitment that delivers value on both sides, but most of the time we’re looking to date before marriage.
Where do salespeople play a role in your overall buying process? What is the most valuable thing a salesperson can do in selling to you?

Troy: I love it when a salesperson acts as a liaison between our company and internal experts within their business that can help us address our needs. I don’t need salespeople who are the A/V version of your website’s features & pricing pages – I can read – but I also don’t expect each rep to be a technical SME. If they can be smart enough to match me to the right person internally that can help me understand how to maximize the value we derive from your product, I’ll be thrilled and much more likely to not just get a deal done, but be sympathetic to that rep’s own needs at the end of the quarter.

What is the biggest mismatch between what you need and how salespeople try to sell to you?

Troy: Look, I’m hyper aware of when I’m part of a cold-email campaign or have ended up in your drip campaign. I know those campaigns drive revenue, but I get half-a-dozen each day and don’t have time to consider each of them. These days I use Spark’s Quick Replies to send a “Please remove me from your list.” back to you before I’ve gotten to the end of the second sentence. Don’t call me; I’ll call you.

How do you leverage your network in understanding the landscape or individual vendor offerings?

Troy: Let me illustrate with a quick story: I’ve been a big fan of persistent group chat for years and have brought IRC, HipChat, or Slack to every engineering group I’ve led over the past decade. Early on at Lanetix we were a HipChat customer, but shortly after Slack launched a peer in my network mentioned his team was using Slack and loving it. I didn’t see much difference between the two products at the time, but given the strong recommendation we decided to kick the tires. We saw Slack had a HipChat-to-Slack migration tool so we ran it, tested out Slack for a few days and met to discuss our thoughts as a team. The result was “yeah, it’s about the same” but we continued forward with Slack instead of HipChat since we’d already migrated the data over and Slack had a few extra days of data in it. Slack wasn’t really the better tool in this case; it won as a customer because someone in my network was a vocal champion, the product was adequate, and the switching cost was low.

Those are great insights Troy, I really appreciate you taking the time to share!
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